

840 Helena Avenue, Helena, MT 59601
1-800-332-6148 (in state)
(406) 444-2040 - Fax (406) 444-3497
e-mail stateauditor@state.mt.us
web site - sao.state.mt.us

(THIS FORM MAY BE DUPLICATED)

- () LIFE
- () DISABILITY
- () PROPERTY
- () LIMITED LINES CREDIT
- () VARIABLE CONTRACTS
- () SURETY
- () TITLE
- () TRAVEL
- () TRIP
- () PERSONAL LINES

Sex (Circle One) M F

6. Detail residence, employment, etc., for the past three years to date.

If yes, give details: _____

9. Have you ever, in this or another state, been refused a license or had your license suspended or revoked?

Yes () No ()

If yes, give details: _____

10. Have you ever been convicted of a felony?

Yes () No ()

If yes, attach copies of court documents: _____

11. Have you ever had an agency contract with a company canceled for a reason other than lack of production or mutual agreement?

Yes () No ()

If yes, give details? _____

12. If the application is for life and/or disability insurance, are you an officer, employee, representative, or hold any interest in a funeral business?

Yes () No ()

13. Are you familiar with the laws of Montana governing the solicitation and sale of insurance?

Yes () No ()

14. Do you understand that you are not to solicit or sell insurance until a license has been issued to you by the Insurance Department and an appointment has been issued to you by the insurer?

Yes () No ()

15. What instruction in insurance have you had or do you expect to receive? _____

Signature of Applicant

STATE OF MONTANA
DEPARTMENT OF INSURANCE
840 Helena Avenue, Helena, MT 59601
1-800-332-6148 (in state)
(406) 444-2040 - Fax (406) 444-3497
e-mail stateauditor@state.mt.us
web site - sao.state.mt.us

INDIVIDUAL APPLICANT INSTRUCTIONS FOR
NON-RESIDENT PRODUCER LICENSE

Applicants for a Montana Non-resident Insurance Producer License are required to complete either the enclosed form or a NAIC Uniform Application for Non-resident License. A complete application packet will include:

- Application Form – completed by the applicant and information must be current to date of application (also available on our website at sao.state.mt.us).
- Certification from your resident state Insurance Department; this certification must indicate that you are currently licensed in your resident state as a producer and list the lines of insurance you are authorized to write (not more than 90 days old).
- Montana licenses Non-resident business entities, on a reciprocal basis. If you intend to solicit on behalf of a business entity and share commissions with a business entity, that entity must also be licensed-in this instance, the Producer's Restriction Letter is not required.
- If you are requesting licensure to market variable products, a U-4 confirmation of status must accompany the application.
- Include a \$100.00 licensing fee per person, per line of authority.
- Montana Non-resident licensees must file an annual Non-resident renewal and verification of continuing education compliance to retain a license in good standing (a current home state letter of certification).
- Incomplete applications will not be processed – unanswered requests for information to complete an application will result in the application being rejected. Application fees will not be returned and the file will be destroyed after 6 months.

**STATE OF MONTANA
DEPARTMENT OF INSURANCE**

840 Helena Avenue, Helena, MT 59601

1-800-332-6148 (in state)

(406) 444-2040 - Fax (406) 444-3497

e-mail stateauditor@state.mt.us

web site - sao.state.mt.us

INDIVIDUAL APPLICANT INSTRUCTIONS
FOR A RESIDENT MONTANA INSURANCE LICENSE

An individual applying for a Montana Resident Insurance Producer's License must complete the enclosed form.

- Application Form – completed by the applicant and information must be current to date of application (available on our website at sao.state.mt.us).
- Proof of passing – test scores from the licensing examination.
- If you are requesting licensure to market variable products, a U-4 confirmation of status must accompany the application.
- A clearance letter from your last state of licensure if previously licensed in another state along with “proof of passing” the Montana law portion of the licensing examination.